

Help Center

Just a click away!



Reports

e-book

ChildPlus
Online



800.888.6674
childplus.com

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The Help Center and Agency Customization

The articles in the Help Center and videos in the Learning Library are based on the default setup of ChildPlus and assume full security access to all platforms, modules, features and fields. If you cannot find or access a feature referenced in an article, be aware that your agency's specific customization of ChildPlus determines:

- Your access to each platform
- Your access to specific modules or features
- Security or location restrictions for your level of access to ChildPlus
- Whether a module or feature has been turned on
- Which fields are available in each module
- The content of drop-down fields

Contact your ChildPlus administrator to verify your security access and the availability of a feature referenced in an article.

If you are a ChildPlus administrator and need to configure security access or turn on a feature, see [User Security Groups](#) or [contact us](#) for additional assistance.

Help Center Updates and ChildPlus Platforms

The Help Center is continually updated to reflect the current version of ChildPlus. Ensure that you are using the [latest version of ChildPlus](#) and referencing an article for the appropriate ChildPlus platform. Instructions for modules often differ between ChildPlus Online and ChildPlus Desktop and are unique for the Attendance App.

- To find out which version of ChildPlus you are using, see [About ChildPlus](#).
- For more information about the different platforms and how to access them, see [Platform Comparison](#).
- To learn about the differences between the modules in ChildPlus Desktop and ChildPlus Online, see [Module Comparison](#).

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Reports

The **Reports** module provides a way to view and compile data. Each report is designed for a specific purpose and knowing which report to use depends on the type of data you want to see.

Locate a Report

All ChildPlus reports have an assigned number and are grouped by category. You can access reports through the report search feature or by selecting a report from the category listing.

Report Search

Use the report search feature to locate a report by its assigned number. This feature is helpful if you know the report number and want to access it immediately.

[ChildPlus Online](#)

You can search for a report by name or number in ChildPlus Online.

1. Go to **ChildPlus Online >> Services >> Reports**.
 2. Enter a report number or any part of the report name.
 3. Click or tap **Go**.
 4. Select the report.
-

Report Category Listing

Use the report category listing to locate a report. This feature is helpful if you know the category of the report you want to run but do not know the report name or number. Some report categories are combined. For example, **Application** reports display in the **Enrollment** category and **Immunizations** reports display in the **Health** category. Most reports only appear in one category and are listed in numerical order.

[ChildPlus Online](#)

To locate a report by category in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Reports**.
 2. Click or tap **All Categories**.
 3. Select a category.
 4. Select the report. Your device's [screen size](#) determines where you can click or tap on the grid to open the report.
-

Screen Size	Visible Columns in the Grid	Action(s)
Tablets and phones	<ul style="list-style-type: none"> • Report name • Report number 	<p>Click or tap the report name or number to display the report favorite, category and description</p> <p>Click or tap any part of the expanded report details to open the report</p>
Tablets, laptops and desktops	<ul style="list-style-type: none"> • Report favorite • Report name • Report number • Report category 	<p>Click or tap More ... to display the report description</p> <p>Click or tap any part of the report details to open the report</p>
Desktops and large laptops	All columns	Click or tap any part of the report details to open the report



You can click or tap the column headers in the grid to sort the reports.

Favorite Reports

The **Favorite Reports** feature in ChildPlus Online provides a way to save and quickly access the reports you use most often. Favorite reports are specific to each user and remain in the **Favorites** category until you remove them.

To set favorite reports in ChildPlus Online:

1. Go to **ChildPlus Online >> Reports**.
2. Do one of the following for each report you want to set as a favorite:

- Click or tap **Favorite** ☆ in the report category listing
- Select a report then click or tap **Favorite** ☆



ChildPlus Online creates a **Favorites** category and adds the selected report to it.

3. Select the **Favorites** category to display all of the reports you selected as favorites.



If no reports are set as favorites, ChildPlus will not display the **Favorites** category in the category listing.

Run a Report

Configure the options on the report setup window to decide who and what to display on a report. Each report has default settings that you can use to immediately view data. Clear or edit the default settings as needed. Explore each option on the report setup window to ensure that the data you want to see will display on the report.



When you run a report, ChildPlus retains the settings you select until you change them. This only applies to standard reports and not **LiveMessage** or **LiveReport**.

Filter Participants

Use participant filters to determine which participants to include on a report. Participant filters display on the left side of the report setup window and display on both standard and grid reports. Filter options must be selected before you can run a report. ChildPlus retains the settings you select until you change them.


Most **Personnel** reports include the option to filter by position. Reports created using **LiveReport** and **LiveMessage** include additional filters. **Module Designer** reports include the same filters used on standard reports.

ChildPlus Online

To filter participants in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Reports**.
2. Select a report.
3. Select an option for each applicable [filter](#).

Filter	Description
Program Term	Display participants with a participation record associated with a specific Program Term
Location	Display participants associated with a selected agency, site or classroom
	Click or tap Options to arrange locations by region or to include applicants who have not yet been enrolled
	Select Include Inactive to include participants from previous Program Terms whose sites and classrooms may be closed

Filter	Description	
Enrollment Status	Display participants with a selected enrollment status	
	Status	Description
	New	New applicants who have not been waitlisted, accepted or enrolled
	Waitlisted	Applicants whose applications are complete, are eligible for the program and are waiting to be assigned vacant slots
	Accepted	Applicants whose applications are complete, are eligible to participate, have been assigned slots and are waiting to attend class or the first home visit
	Enrolled	Participants who have been accepted and attended at least one class for the center-based or family child care option or at least one home visit for the home-based option
	Dropped	Participants who were enrolled in your program, left before the end of the Program Term and do not anticipate returning for the current Program Term
	Drop/Wait	Participants who left your program and anticipate returning for the current Program Term
	Drop/Accept	Participants who left your program and have been accepted back into the program for the current Program Term
	Completed	Participants who made it to the end of the Program or Program Term
Abandoned	Applicants who never enrolled and are no longer eligible for or interested in the program. They completed an application, but should no longer be included on the waitlist	
 Flag/Group	Display participants from a specific Participant Group	

Filter	Description
Program Option	<p>Display participants within a specific Program option</p> <p>Use the default selection of ALL if your Program only operates with one option</p>
Responsible Staff	<p>Display participants associated with the staff member listed in their records for a selected service area</p>
Custom Filter	<p>Display participants associated with specific custom filters</p>



ChildPlus administrators can configure **Participant Groups** in **ChildPlus Desktop >> Setup >> System Setup >> Define Participant Group**.



Some report setup filters allow you to select one or more options. When all options are selected for a filter, the checkbox will contain a blue checkmark. When some but not all options are selected for a filter, the checkbox will contain a blue square.

Filter Data

Use data filters to determine what data to include on a report. Data filters display on the right side of the window and are specific to each report. Use data filters to determine which records will appear on a report and include or exclude specific data. ChildPlus retains the settings you select until you change them.

[ChildPlus Online](#)

To filter data in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Reports**.
2. Select a report.
3. Select an option for each applicable filter.

Format a Report

Use report formatting to determine how you want data to display on a report. Report formatting options include **Grouping** and **Report Type**. Use **Grouping** to group participants by location. Use **Report Type** to determine the level of detail to display. Not all formatting options are available for all reports. ChildPlus retains the settings you select until you change them.

[ChildPlus Online](#)

To format a report in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Reports**.
2. Select a report.
3. Select a **Grouping** option. Data can be grouped by **Agency**, **Site** or **Classroom**.
4. Select a [Report Type](#).

Report Type	Description
Detail	Display participants' names and data
Summary	Displays the sum totals for data and hides participants' names
Worksheet	Displays the report as a form that can be used to collect data manually
Individual	Inserts a page break after each individual participant or family

View a Report

Learn how to view a report in ChildPlus.

ChildPlus Online

To view a report in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Reports**.
 2. Select a report.
 3. Click or tap **View**. ChildPlus Online displays the report in a new tab.
-

Report Navigation

Use this section to learn how to move through the pages of a report, locate participants or data within a report and ensure that you are viewing the most recent data.

ChildPlus Online

Icon/Text	Description
Toolbar	
	First page
	Previous page
1 of ____	Select a page
	Next page
	Last page
	Toggle multipage mode: enable continuous scrolling
	Toggle multipage mode: disable continuous scrolling
	Zoom out
Whole Page	Select a zoom level
	Zoom in
	Highlight editing fields
	Print the report
	Print the current page of the report
	Export the report to a selected file type
	Search for data in the report

Icon/Text	Description
Sidebar	
◀	Expand the sidebar
▶	Collapse the sidebar
⚙	Display export options

View Individuals

Use this option to view data for specific individuals on a report.

ChildPlus Online

To display selected individuals on a report in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Reports**.
2. Select a report.
3. Click or tap **Individuals**.
4. Select the individual(s) to display on the report.
5. Click or tap **View**. ChildPlus Online displays the report in a new tab.



To display data for all individuals on a report, click or tap **Close** on the **Individuals** window then click or tap **View** on the report setup window. ChildPlus Online opens the report in a new tab.

Close a Report

Learn how to close a report in ChildPlus.

ChildPlus Online

To close a single report in ChildPlus Online, close the tab.

The options for closing multiple tabs depend on your browser and device.



When you close a report tab, ChildPlus Online will remain open in the tab with the report setup window.

Custom Filters

Custom Filters provide a way to create specialized lists of participants and reports. You can use **Custom Filters** to filter participant lists in various parts of ChildPlus on the setup windows for most reports. When you create **Custom Filters** in one location, they can be saved and accessed in filter lists across ChildPlus.

Custom Filters generally consist of four parts: a table name, a field name, a query operator and the data to match. The table and field names tell ChildPlus where to look for data; the query operator tells ChildPlus how to compare the data in the specified field to the data to match; and the data to match tells ChildPlus what it is looking for.

If your search is for instances where a field name is empty or not empty, the custom filter will only consist of three parts: a table name, a field name and a query operator.

Apply a Custom Filter

Use this section to apply a custom filter to a report. ChildPlus retains the settings you select until you change them.

ChildPlus Online

To apply a custom filter to a report in ChildPlus Online:

1. Go to **ChildPlus Online >> Services >> Reports**.
 2. Select a report.
 3. Click or tap **Custom Filter**.
 4. Select the filter(s) to apply to the report.
 5. Select whether to match every filter or any filter. **Match Every Filter (AND)** is selected by default.
 6. Click or tap **OK**.
-

Custom Filter Templates

ChildPlus provides custom filter templates in the **Custom Filter Templates (To Copy)** group that you can use immediately or copy and edit as needed. Use the following table to see the custom filter templates grouped by function.

Function	Custom Filter Name
Age	Actual Age is 4 Years
	Actual Age is 6 Months
	Actual Age is 6 Weeks
	Class Age is 3 Years
CACFP	CACFP Equals Full Reimbursement
Dental	Participant has a Failed Dental Exam
Entry Date	Participant entry date is less than 30 days ago
	Participant entry date is less than 45 days ago
	Participant entry date is less than 90 days ago
	Participant entry date is more than 30 days ago
	Participant entry date is more than 45 days ago
	Participant entry date is more than 90 days ago
Health	Treatment Need but not Received
Hispanic	Participant Race is Hispanic
Immunization	Next Immunization is Due
Income	Eligibility Income is Zero
	Participants who are Over Income
Medicaid	Income Eligible Participants not on Medicaid
Participant Information	Participants Live in Specific City/Town
WIC	Participants Not Receiving WIC

Basic Query Operators

Use query operators to specify the type of information you are looking for when using **Custom Filters**. Use the following table to learn about all of the basic query operators available for custom filters.



The query operators available for each custom filter depend on the type of information you are filtering on.

Operator	Description
ENDS WITH	Selects records that end with a specific character(s) or number(s)
EQUALS	Selects records containing an exact match for the condition you specify For example, Gender EQUALS Female selects only females
GREATER THAN	<ul style="list-style-type: none">• Date fields: selects records after the specified date• Numeric fields: selects records greater than the specified amount
GREATER THAN OR EQUAL TO	<ul style="list-style-type: none">• Date fields: selects records on or after the specified date• Numeric fields: selects records greater than or equal to the specified amount
IS EMPTY	Selects records in which the selected field is empty
IS NOT EMPTY	Selects records in which the selected field is not empty
LESS THAN	<ul style="list-style-type: none">• Date fields: selects records before the specified date• Numeric fields: selects records less than the specified amount
LESS THAN OR EQUAL TO	<ul style="list-style-type: none">• Date fields: selects records before or on the specified date• Numeric fields: selects records less than or equal to the specified amount
NOT EQUAL TO	Selects records that do not contain the specified condition For example, Gender NOT EQUAL TO Female selects records that are not for females
STARTS WITH	Selects records that start with a specific character(s) or number(s)
IS TODAY	Date fields: selects records with the current date

Operator	Description
IS WITHIN THE LAST X DAYS	Date fields: selects records within the specified number of days and current date
IS WITHIN THE NEXT X DAYS	Date fields: selects records within the specified number of days and current date
IS OVER X DAYS AGO	Date fields: selects records within the specified number of days and current date
CONTAINS	Selects records that contain a specific character(s) or number(s)

Additional Query Operators

These additional query operators control the behavior of custom filters and are helpful when running more than one filter. Use the following table to learn about the additional query operators available for custom filters.

Operator	Description
AND	<p>Use AND when using two or more custom filters. AND joins two custom filters together and is used in situations where you want your results to match both custom filters; it narrows the number of records returned</p> <p>For example, two custom filters are set up - one is for Medicaid Eligibility Code EQUALS P – Potentially Eligible and the other is for Gender EQUALS Female. If you join these two custom filters with an AND operator, then ChildPlus will return records for individuals who have a Medicaid Eligibility Code of P and whose gender is also female. No males or individuals with a Medicaid Eligibility Code other than P will be returned in your query results</p>
OR	<p>Use OR when using two or more custom filters. OR joins two custom filters together and is used in situations where you want your results to match one of the custom filters; it broadens the number of records that are returned</p> <p>For example, two custom filters are set up - one is for Medicaid Eligibility Code EQUALS P – Potentially Eligible and the other is for Gender EQUALS Female. If you join these two custom filters with an OR operator, then ChildPlus will return records for individuals who either have a Medicaid Eligibility Code of P or whose gender is female. Males may be returned in your query result if they have a Medicaid Eligibility Code of P</p>
Parentheses ()	<p>Use parentheses to control the behavior of custom filters. They are necessary if you are generating a custom filter that uses both AND and OR operators. Parentheses separate data and tell ChildPlus which part of the query to execute first</p>